DOCUMENT RESUME

ED 359 653 EA 025 095

AUTHOR Pearce, Jonathan
TITLE Educators in Retirement: A Reflection on the Merits of a Sustaining Relationship.
PUB DATE Aug 93
NOTE 24p.
PUB TYPE Reports - Research/Technical (143)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Elementary School Teachers; Elementary Secondary Education; *Employer Employee Relationship; *Employment Practices; Job Satisfaction; *Personnel Policy; *Retirement; School Districts; *School Personnel; Secondary School Teachers; Teacher Attitudes; Teacher Retirement

ABSTRACT

Findings of a study that examined retired educators' attitudes toward their retirement are examined in this paper. A survey of 260 educators--of whom three/fourths were K-12 teachers and one-fourth were school administrators--in four California counties elicited a 52 percent return rate. Findings indicate that retired educators were not inclined to complain about their circumstances. However, many respondents perceived that their former employing organizations did not regard and respect them. Retirement is also compared to the process involved in suffering a major loss. It is recommended that districts provide expanded preretirement orientations, recognize service and express appreciation in a well-planned and executed ceremony, make efforts to maintain contact with retirees, and utilize the energy and talents of retirees. Five tables are included. (Contains 33 references.) (LMI)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED359653

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
✓ This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
J. Pearce
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)"

Educators in Retirement: A Reflection on the Merits of a Sustaining Relationship

by

Jonathan Pearce

ABLE Consulting Services
2017 West Hammer Lane
Stockton, CA 95209-2909
(209) 477-2123

August 1993

EA 025095

BEST COPY AVAILABLE

Educators in Retirement:
A Reflection on the Merits of a Sustaining Relationship

Introduction

The age at which people typically retire is the beginning of the final stage in the life cycle, that period in which each individual chooses and creates the attitudes and behaviors that comprise integrity or despair, in which integrity is based on the accumulated wisdom of the individual, and despair is the individual's dystonic reaction to feeling confused, helpless, "finished." (Erikson 1982). Whatever the emotional independence or attachment of the retiree, psychologists agree that entering into retirement from almost any career is one of those "major life changes" that is akin to suffering a bereavement (Marris 1974). And however happily-anticipated it may be, retirement is a complex and emotionally demanding phenomenon that requires far more preparation than most prospective retirees comprehend and, arguably, far more planned support than is now provided by most employers.

Although many people find retirement an overwhelmingly positive experience (Wilson 1983), the series of losses triggered by retirement devastates some. Many retirees in the general public, even those who freely chose retirement, feel that they did so prematurely. They lack a daily focus and sense of purpose. They often feel isolated. They often feel that their families and ex-associates no longer value them (Waters and Goodman 1990). "For the unprepared, for those whose creativity and involvement in work has been of major importance and whose identity is largely derived from that work, there can be at retirement and for years afterwards a bitter and deprived feeling of being expelled and depreciated" (Erikson and others 1986).

For educators the traditional targets of retirement seem to have been to travel, to settle down on the chicken farm or its urban equivalent, and to loaf about, dandling the grandchildren or just reading or writing. The targets have not typically anticipated today's possible retirement realities of needing to take a job to help pay ever-rising health insurance premiums and utility bills; and the very probably realitites of worrying about assault, burglary, and disease.

I have been impressed with the vitality observable in most retirees. Many in the audience at city and county government meetings are "seniors." The

letters to the editors of local newspapers are often written by retirees proposing some sort of action. The ranks and leadership of community service organizations are filled with senior citizens. Older folks are present in large numbers in nightschool classes, on the jogging paths, and in the gymnasiums, "improving" themselves. Seniors are celebrated in the media, not only because there are so many of them, but also because they are spending the money they may have saved over the years and are recognized opinion leaders, as well. Politicians seem to make special efforts to court retirees, for retirees are often first in line at the polling place. Indeed, it is retirees who, as poll-watchers, most often host the voters.

I have therefore found quite remarkable the number of retired educators volunteering unprompted, the information that they were not well-prepared for retirement and that the organizations for which they had worked for so many years seem no longer to remember or care about them, a perception evoking from these retirees a feeling of sadness and resentment, of having been expelled. These sentiments expressed among a population so largely celebrated as optimistic, healthful, and active may be the product of unresolved grieving by a few of the loss of career, or they may proceed from depression produced by a variety of stimuli, or they may be associated with physical illness. They may also be unintended consequences of school district policies and procedures, or lack of them and, if so, there may be discovered some relatively simple remedies to benefit all concerned.

The Problem

The chief problem addressed in this study was to identify the nature of the feelings that retired educators have about their retirement, especially as it may bear on their relationship with the organizations from which they retired. The question to answer was what, if anything, might school organizations choose to do in order to capitalize on affirmative feelings and redress negative feelings?

The Population

The population for the study is an 800-member chapter of an organization of retired educators. The organization invites membership from professionally-certificated persons from public K-12 districts, community colleges, and public and private universities. The geographic area for the population includes one entire California county and portions of three

others. Most of the members are classroom teachers from the K-12 ranks and about two-thirds are female. The membership also includes a small minority of school and district administrators and a few community college and university teachers, administrators, counselors, and librarians.

The population includes members who reside out of state and who appear to span a range of ages from 55 to 95. Members surveyed in this study retired as recently as 1993 and as far back as the early 1960's.

The Sample

A sample was identified from the mailing list of the organization by means of standard scientific random selection technique (Roscoe 1975). The sample consists of 260 members whose characteristics closely match those of the population, including the proportion of females to males, teachers to administrators, public K-12 employees to college and university personnel. Out-of-state residents included in the sample correspond with the same proportion in the population, and in the universe of American retired educators (Flynn and others 1985): about four percent. Fifty-two percent of the sample returned useable responses.

Bias in the Sample. The sample reflects the general bias in the population which is that the membership of the organization consists of self-selecting, dues-paying volunteers, persons possibly more likely than most to have maintained professional interests and activities; and possibly more social, more affirmative about their experiences as educators (and possibly about their experience as retired persons) than those who choose not to participate in the organization.

Generalizing from the Sample. The very representativeness of the sample enhances generalization of the findings to the population. However, extrapolating to all retired educators everywhere the sentiments of the participants in this study would be inappropriate statistically. The responses may nevertheless offer school boards, responsible administrators, and teacher advocacy groups some relevant indicators of how retired educators view the organizations to which they devoted years of professional service; and suggestions as to how these organizations might choose to respond to those sentiments. The narrative comments that many respondents appended to the survey instrument capture feelings that are powerful and appear heartfelt.

Comparison Sample

A comparison sample was also identified to provide an index of the appropriateness of the sample by comparing and contrasting responses of the self-selecting population with a random sample of retired educators at large. However, the return was negligible and therefore not useful.

The Survey Instrument

The instrument was a 46-statement mailed questionnaire. Respondents were not asked to provide their names or identify the organizations from which they had retired. The instrument was delivered return-postage-paid.

Contents of the Instrument

Forty-five items were oriented to areas of retiree-related research in a variety of disciplines, including psychology, gerontology, sociology, anthropology, and education administration; and were designed to contribute to answering the research question posed by this study. A final, forty-sixth, item was an open-ended invitation for the respondent to give advice to employers as to how to "handle" employees at the time of their retirement and thereafter. Those narrative comments contribute importantly to the discussion and to the recommendations below.

The first 12 items identified personal data, pre-retirement employment status and retirement income sources.

Nineteen other items were designed to reveal attitude about the organization and the job from which the respondent retired, the kinds of overtures those organizations may have made to the retiree, the kind and quality of involvement maintained with the organization by the retiree, and attitude about retirement itself.

Three statements referred to general health of the retiree.

Five items addressed the feelings of the retiree about "the job" during the first year of retirement.

Six statements related to loss, separation, and grieving.

Reliability of the Instrument

A check of survey form and contents was made by five adults in separate reviews to determine both the apparent reliability of the items and the feelings of the raters about the form and of the questionnaire and the clarity of the statements. As a result of this "pilot study," four items were reworded for clarity, but no item was eliminated, the raters agreeing that the questionnaire was necessarily lengthy, and remarking that retirees were likely to attend to all the questions and statements.

Related Literature and Background for the Study

The literature of psychology, sociology, gerontology, anthropology, and education administration provides informed perspectives on salient elements of this study. The literature dealing with the broad variety of phenomena associated with separation and loss is of major importance in understanding some of the feelings of retirees. The preparation educators do and do not make for their retirement has long-lasting consequences, as is suggested in the literature.

Separation, Loss, and Retirement

Educators typically retire into a less precarious situation than do the older workers who leave business and industry today, for the basic retirement plans of certificated school folk are most frequently state-sponsored and reasonably well-protected legislatively; but retirees from education do worry (Strate 1984). The media are now full of tales of industrial workers of 30 and 40 years tenure whose companies fold and who are left without annuity of any kind. Tensions among elders rise higher when these stories focus on the workers of 30 and 40 years of loyal service to a company that simply lays them off and sets up shop in a foreign country.

Other features that heighten anxieties among retirees are the reported pension-fund-raiding adventures by speculators and proposed pension-fund-borrowing by legislators (Inman 1983; Mooney 1990). Tempers, blood-pressures, and fears probably rise concurrently when retirees observe the relatively benevolent sentences levied on white collar

billionaire criminals whose greed has wiped out the savings of thousands of elder citizens.

Mental health practitioners describe six to nine or more stages through which bereavement progresses. In whatever mode the grieving may proceed, it occurs in phases the first of which is a numbness or lack of vigorous feeling, then into yearning for the lost condition, then into a disorganized state in which one's feelings are confused, and finally grieving that, if successful, culminates in reorganization that may be discerned in one's clarity of focus on the problems of daily living.

"Anger and separation are intertwined, and they create an inherent dynamic conflict regarding response to loss" (Bloom-Teshbach and Bloom-Teshbach 1987); that is, one may love a lost object and at the same time hate it for having become lost. The "object" may be person, place, thing, organization.

Men and women appear to handle the loss of career differently. For example, men who are widowed after retirement are far more likely than women retirees to experience profound loneliness and a general degeneration of morale (Elwell and Maltbie-Crannell 1981). However, women apparently do less planning than men (Richardson 1990) and fare no better than men, especially if they retired from a mid- or upper-level position and had a high work commitment. A low retirement income appears to cause more adjustment problems for women than for men (Waters and Goodman 1990).

Preparation for Retirement

The feelings of bitterness and devaluation among retirees noted by Erikson (Erikson and others 1986) may be exacerbated by the sense of loss in comprehending that one's connections with a love object of often a quarter of a century or more have been severed, at least formally. Additionally, Erikson notes, "a separation from the work setting may engender a sense of inferiority by removing the individual from many areas in which he or she has participated with competence."

Most preparation for retirement is informal (Ekerdt 1987); that is, the potential retiree may seek some information, but does not systematically consider all the factors involved in creating an entirely satisfactory retirement situation. The optional comments in the present study bear out

this observation. Competent, compassionate leadership can likely ease the transition (Campbell and Johnson 1983).

The Data

Overview

The 45 statements include 14 grouped below for analysis (hereafter referred to as Group A) so as to identify respondent status. Responses to five items (Items 7-10) were discarded in that it was discovered in a re-examination of the literature that the data those items might produce would serve no useful purpose in this study. One (Item 11) identified number of years retired, and one (Item 17) enabled respondents to indicate an "other" occupation (none was indicated). Groups B and C detailed below complete presentation of numerical data.

The Data for Group A

Table 1 illustrates responses to the 14 items of Group A, providing number and percentage of "agree" responses for each item. The items indicate respondent status; the phraseology of the statements is self-identifying.

Table 1
"Agree" Responses to Group A Items

Item	n	%
1. Male	41	30.4
2. Female	94	69.6
3. Single	19	14.1
4. Married	75	55.6
5. Divorced	10	7.4
6. Widowed	30	22.2
12. K-12 Teacher	102	75.6
13. K-12 Dist Adm	6	4.4
14. K-12 Sch Adm	23	17.0
15. Coll-Univ*	9	6.7
18. STRS	129	95.6
19. Soc Sec	86	37.0
25. Commitment	115	85.2
26. Employed	8	5.9

*Includes all college-university
N=135

Review of responses to statements in Group A, Table 1. Three-fourths of the respondents were K-12 teachers, females are three times more numerous than males, somewhat more than half the respondents are married, a fifth are widowed, more than four-fifths felt a strong commitment to their pre-retirement job, and most are on State Teachers Retirement System income. A third collect federal social security, which may be in addition to STRS or in place of it. Only a few are now employed in full-time or part-time jobs.

The Data for Group B

Nine statements (hereafter referred to as Group B) relate to mental and physical health and the phenomena of separation and loss. Group B items read as follows:

33. I did not enjoy my job situation in the year before retirement.
34. In retiring, I feel that I have lost more than I have gained.
36. I consider my general health at present, for my age, to be poor.
37. I consider... Fair
38. I consider... Excellent
39. During the first year after retiring, I remember that I had a general lack of feeling about having left the job.
41. During... I felt some confusion or worry about my future.
42. During... I sometimes felt a yearning for my lost position, associates, and/or place.
44. I now usually have a clear daily focus and sense of purpose

Table 2
"Agree" Responses to "Group B" Items

Item	n	%
33. Not enjoy job	34	25.2
34. Lost more than gained	9	6.7
36. Poor health	5	3.7
37. Fair health	44	32.6
38. Excellent health	87	64.4
39. Lack of feeling	20	14.8
41. Confusion or worry	12	8.9
42. Yearning for lost place	52	38.5
44. Daily focus, purpose	112	83.0

N=135

Review of responses to statements in Group B, Table 2. The items in Table 2 are grouped so as to enable easier discernment of an informal "affect profile" related to self-described health, general sentiment of loss, and the likely resolution of job-loss-associated grief. Nearly two-thirds report

having experienced some of the features of job-loss-related mourning during their first year of retirement (Items 39, 41, 42). Although no guarantee that all mourning is resolved, this degree of agreement appears to be a favorable indicator.

Nearly two-thirds report fair-to-excellent current health, this in a cohort that spans ages 55 to 90. Almost four-fifths declare that at present they do have a sense of daily purpose. About seven percent feel that in retirement they have lost more than they have gained. From these data one may infer that most of the reporting retirees comprise a healthy, focused, relatively optimistic group.

The Data for Group C

Eleven items (hereafter referred to as Group C) address retiree-school district relationship and what might be referred to as "retiree professional identity." Table 3 presents the responses to Item 29, the "felt turned-out" item. Table 4 illustrates respondent sentiment about the relationship of retiree and district in 11 items from Group C that are central to the problem presented in this study. Table 5 provides the perspective of time.

The statements for the items in Group C read as follows:

Item 20. I am generally pleased with and proud of the school district from which I retired (hereafter referred to as "my district").
Item 21. Since retirement, I have been able to maintain membership in at least one professional education subject-matter or honorary organization (for example, CATE, ASCD, IRA, PDK, DKG).
Item 22. In retirement, I have been invited to participate in social and/or in-service and/or advisory committee activities in my district.
Item 23. Since I retired, my district has solicited my volunteer services.
Item 24. Throughout my retirement, my district has given me the impression that they remember and respect me.
Item 28. My school or district or PTA or booster organization regularly sends me newsletters, notices, or information about their activities.
Item 29. I feel that my district turned me out and gave me no further thought.
Item 31. In retiring, I feel that I have gained more than I have lost.
Item 35. At the time of my retirement, my district recognized my service with suitable and sufficient ceremony.
Item 40. I felt relief and satisfaction at having left the job.
Item 43. I still maintain a feeling of kinship with my district.

Table 3
"Agree" Responses to Group C Items

Item	n	percent of N
20. Proud	91	67.4
21. Membership	65	48.1
22. Invited	40	29.6
23. Volunteer	27	20.0
24. Respect	43	31.9
28. Info	29	20.7
29. Expelled	37	27.4
31. Gained	88	65.2
35. Celebration	96	71.1
40. Relief	77	57.0
41. Kinship	64	47.4
N=135		

Review of responses to statements in Group C, Table 3. About two-thirds of the retirees still feel proud of the organization from which they retired, and feel that in retiring they have gained more than they had lost. Nearly half belong to a professional subject-matter or honorary education organization. Almost half still feel a kinship with their district.

Considerably less than half feel that their district remembers and respects them (Item 24). It is possible that some respondents found the compound focus of the statement to be ambiguous and for that reason declined to "agree."

Almost three-quarters feel that they had been suitably feted at the time of their retirement. About a fifth have been solicited by their district to volunteer for some service to the district. About a fifth regularly receive some kind of information from the district or an agency of the district.

Closer examination of responses to Item 29. More than a quarter of the respondents indicate that they feel "turned out" from their district. Affirmative response to that item (Item 29: "I feel that my district turned me out and gave me no further thought") is central to the problem defined for this study, and therefore selected responses of those who agreed with Item 29 were examined.

Table 4 presents the responses to a variety of items of those individuals who agreed with Item 29 (I feel . . . turned out. . . . "). For purposes of contrast, Table 4 also presents the responses to those same items of the individuals who did not agree with Item 29.

Table 5 pursues the analysis of Item 29 responses, reviewing the years-in-retirement of the respondents. Discussion follows presentation of each table.

Table 4

Response to Selected Items of Those Agreeing and Not Agreeing with Item 29, "I feel that my district turned me out and gave me no further thought."

Item	Agree with Item 29			Not agree with Item 29	
	n_1	%	X^2	n_2	%
20. Proud of district	17	45.9		81	82.7
21. Maintain membership	13	36.1		51	53.1
22. Participation invited	1	.028	16.055*	41	42.7
23. Solicited volunteer	1	.023	16.055*	26	27.1
24. Remembered & respected	1	.028	16.055*	43	44.8
28. Newsletters & info	1	.028	16.055*	29	30.0
31. Retirement gain	26	72.2		58	60.4
35. Appropriate ceremony	23	63.9		74	77.1
40. Relief upon leaving	26	70.2		52	54.2
43. Kinship with district	10	27.8		58	59.2

N=135, n_1=37, n_2=98
df=1, * p. =.001

Review of responses to Table 4. The first item in Table 4 indicates that of the 37 retirees who feel "turned out," less than half express pride in their district, whereas more than four-fifths of the other respondents say they feel pride in the organization from which they retired.

There is a marked similarity of response to Items 22 (Participation invited), 23 (Solicited volunteer), 24 (Remember and respect), and 28 (Newsletters and information) from the agreeing retirees, the Chi-square products emphasizing the extraordinary degree of difference of a few from statistically expectable answers. Nearly all (36 of 37) of these "turned-out" respondents say that their districts have not invited their participation in social activities, in-service offerings, or advisory committees. Their districts have not asked them to volunteer services. Their districts, their schools, their PTAs, or their booster organizations have not sent newsletters, notices or information about activities to the retirees.

Perhaps the most poignant statistics are in the responses to Items 43 (Kinship) and 20 (Proud): More than a quarter of those who feel "turned out" nevertheless feel a kinship with the district, and nearly half express

pride in it. For educators socialized within an organization and trained to nurture, it is evidently difficult to deny the worth of the "family" in which so much of one's life has been invested.

Among those <u>not</u> agreeing with Item 29, almost two-thirds feel that retirement for them is more a gain than a loss (Item 31). More than half agree that they felt "relief and satisfaction" upon leaving the job (Item 40). Twenty-six percent do not agree that their district recognized their service with suitable and sufficient ceremony.

Table 5

Response to Item 11(Group A), Years Retired, by Those Agreeing and Not Agreeing with Item 29

	n	Mean (Yrs)	S.D.	S.E.	Mode
Agree with Item 29	37	9.216	7.126	.624	5
Not Agree	98	11.689	7.256	1.172	9

N=135

<u>Review of responses to Table 5</u>. Table 5 illustrates that the <u>average</u> years in retirement of those in agreement with Item 29 (feel "turned out") is 9 years, and that the years-in-retirement of the greatest number of retirees in this group is about five.

The table also shows the average years in retirement of respondents not in agreement with Item 29 (not feeling "turned out") is almost twelve, and that the years-in-retirement of the greatest number of retirees in this group is nine.

One might presume that the older one is and the farther from the date of retirement, the more likely one is to feel distance from the organization and perceive that the organization may have forgotten one. But even granting the standard error, that is not the case. It appears that the retirees who feel "turned out" are those who left the job more recently than the others.

Characterization and Discussion of the Narrative Comments

Forty-two individuals contributed 80 narrative comments, many of the remarks extended, in response to the Item 46 prompt, "If my district were to ask me for advice about how to 'handle' employees at the time of their retirement and thereafter, I would suggest that they (please complete the

sentence with a list or a few suggestions):" For the sake of brevity, respondent comments below are characterized instead of presented verbatim. The author's commentary may be interpolated for emphasis. Comments corresponding with findings in the literature are so noted. The characterized comments can be subsumed under four rubrics.

•1. Districts should provide expanded pre-retirement orientation

"The district (emphasis added) should provide us with more information about our options," say retirees, this in the face of efforts by the (California) State Teachers Retirement System to present informational workshops, and despite the ministrations of dozens of annuity salespersons yearly touting their wares in faculty rooms, warning of slim fare in one's retirement cupboard if the proper insurance is not bought in time.

Responses often support statements in the literatuere suggesting that

> Present efforts are not enough; and educators may also be unsure as to *when* they should retire (Ciavonne 1984).
>
> Many educators seem before retirement to be unconcerned or naive and relatively ignorant about their likely future needs (Kompf 1991).

Retirement, however long anticipated, has a sudden onset; and districts and teacher-advocacy organizations would be performing valuable service were they to

> sponsor, expect, and encourage more and earlier participation in efforts to offer information about retirement plan options,
>
> provide orientation to the phenomena of separation and loss likely to affect retirees,
>
> give staff information about support groups for new retirees,
>
> identify opportunities for retirees to maintain connections with their organization (Morud 1990; Tocco and Ingram 1985).

•2. Districts should recognize service and express appreciation in ceremony that is planned and executed with care

A human services organization like a school or school district is not a machine, and its components are not interchangeable mechanical parts.

Whereas the loss of some employees to retirement may be perceived as important only to those retirees and their families, the discerning analyst may observe that any loss in an organization produces some degree of change perceptible throughout the organization.

It now seems well accepted among educators that people "...generally feel some need to have rites performed at certain transition points in their own lives and the lives of others near them," (Kertzer 1988), and that "through ritual the individual is separated from his or her previous status and inducted into the new one;" for "unresolved change and grief," as Deal observes (Deal 1993), "either mire people in the past or trap them in the meaningless present. The unhealed wounds following a change can weaken individuals, classrooms, or schools."

Ceremonies of farewell, the rites that can heal wounds and help rebalance individuals and organizations, ought not be left entirely to the school. Respondents suggest that retirement ceremonies should be planned and coordinated so as to give the impression of the caring that putatively permeates a school system, and that it is the system as well as the school that is celebrating the achievements of the retirees. Several comments refer to the embarrassment of all present resulting from obviously unplanned ceremony. Others mention the pain felt by the veteran staff members of having had their names mispronounced during a farewell presentation. One mentions that no farewell gift at all is better than a bracelet charm obviously bought in volume and engraved with the retiree's name misspelled. Three observe trenchantly that the more retirees recognized per ceremony, the shorter and less enthusiastic are the encomia, and the cheaper are the farewell gifts.

The retirement dinner and/or other ceremony appears to be appreciated if it is personalized so as to recognize the professional achievement of the retiree. The object of praise and the relatives who may be present are much too tied up in the emotion of potential loss and separation to criticize the performance of those offering the praise --unless the ceremony is perfunctory, incompetent, and obviously insincere.

What retirees identify as equal to ceremony in importance is evidence of the regard of colleagues as represented in personal notes around the time of retirement, letters of reference and appreciation from superiors, and letters and cards from members of the board of education in which the recipient is addressed personally and complimented, not simply notified that the retirement had been entered into the minutes of a meeting of the

board. If certificates are presented, says one respondent, they ought to be suitably framed, not thrust "already dog-eared" at the retiree.

Several respondents mention that representatives of the district, not only the school, ought to make an effort to participate in retirement ceremonies and other recognitions of service, however extensive district-level responsibilities might be at the time, and however busy district-level leadership is. "Those people," says one respondent of district officers, "send a message by their absence."

Several respondents observe amusingly that a cash bonus at the time of retirement "would be a nice touch" or that "paid health benefits for life" would be a most fitting recognition of service.

•3. Districts should make efforts to maintain contact with retirees

Respondents point out that it is important to them that their district establish and maintain a post-retirement relationship by systematically demonstrating interest in the former employees. Many of the ways suggested by respondents are already described in the research literature.

Districts could

Designate an officer to serve as official liaison person with retirees. The higher the status of that person in the organization, the higher the priority perceived to have been assigned to retiree affairs.

Include retirees on mailing lists to receive school and district newsletters that may describe district events and activities, and the achievements of employees, children, and youth.

Invite retirees and provide free or reduced admission to special events like athletics contests, music and dramatic presentations, and ceremonies recognizing student achievement. Recognize publicly, by name, the retirees present at such events whenever it is appropriate to do so.

Sponsor a no-host luncheon once or twice a year at which the district superintendent or a deputy and a member of the board can address the retirees and bring them up to date on district progress in meeting priorities.

Provide retirees with honors, such as parking privileges (Blum 1988) and/or athletics and/or theatre passes.

Survey retirees periodically by mail or phone to determine interests and feelings about district projects, to discover news about the projects of retirees that might be of interest to former colleagues, students, parents,

and the public press; and to ensure the accuracy of the data base on retiree demographics.

Create and distribute a newsletter especially for retirees.

Phone or send cards recognizing birthdays and significant anniversaries of retirees.

Solicit local service clubs to sponsor subscription to yearbooks and school newspapers for those retirees who have expressed interest in those publications.

•4. Districts should use the energy and talents of retirees

Respondents agree with Erikson that discarding the productive potential of elders is unjustifiably wasteful (Erikson and others 1986), and suggest a number of ways they could be useful to the district from which they retired.

Supported by information from studies cited in the literature, districts could

Take advantage of the talent and experience and willingness of retirees by actively recruiting them for service on curriculum advisory committees, policy recommending groups, schoolhouse planning task forces, athletic and artistic booster groups.

Encourage, enable, and celebrate publicly the volunteer services of retirees who demonstrate for students or teachers an art or craft, tutor (Holmes 1985), teach a lesson, tell stories, aid a former colleague, or serve as a part-time clerk (for example, to create a data base of district retiree names and addresses).

Invite retirees with a specialty to teach a mini-course for students or conduct an inservice seminar for teachers (Dorfman and others 1984). Offer payment for such service.

Refer teachers new to the district for "networking" with volunteer retirees who have been selected and trained by the district to provide guidance and advice to the newcomers (Gold and Pepin 1987; Walsh 1989) in person, by phone, or/and via computer modem (Hunter and Eskridge 1989).

Recruit and train retirees to serve the district as lobbyists to local and state government agencies (Claugus 1987; Schoenfeld 1992) and businesses (Estrin 1987) and special populations (Boulding 1987).

Solicit retiree participation in the local pool of substitute teachers.

Employ selected retirees for regular part-time work in specialty areas and to the extent allowable by law (Smith 1992).

It must be emphasized that few of the narrative comments or marginal notes made by respondents on the survey instrument could be classified as "complaining." Sometimes witty, the remarks most often appeared thoughtful, sincere, helpful, heartfelt, and kind.

Summary, Conclusions, and Recommendations

The data suggest that like retirees from many other fields (Ekerdt and others 1983), retired educators are in good health and, possibly unlike retirees in other fields, do not seem to be in serious financial disarray. But they are also not inclined to complain about their circumstances. This acceptance of what-is without gross complaint may be a result of the training effect of the culture of schools on the retirees who are, by and large, organization-bound people who have done some planning, but not much, have saved systematically, but not much, and have learned not to make waves. Their dreams are not large, and many spend their time productively in volunteer work and grandparenting --some in re-parenting grown children who have been limited by hard times from flying far from the nest.

The arguments offered in this study are only tangentially concerned with the creature-comfort aspect of retirement. Whether or not they recognize their condition, those who have recently retired have suffered a major loss, they are in mourning, and they require some assistance to "work through" their grief. Those who have been retired for some time might be expected to have come to terms with their loss, and this study provides data that suggest corroboration of that expectation.

The data illustrate the regard with which most respondents hold their districts. However, the less sanguine inference that remains is the perceived quality of the regard and respect that the employing organizations demonstrate toward the retiring and retired employees. The disaffected are too numerous to be ignored. However, an organization is able to give evidence of the health of its institutional memory as its personnel routinely mature and depart. For example, some organizations display photographs or make video histories of their building projects, their student achievers, their parent support groups, their community benefactors, their school board members, and their faculty "legends."

The retirees reveal mixed emotions about their individual send-offs. They comment not so often on the expected twin sentiments of relief and regret

at leaving, but more frequently on their ambivalence about the quality of the departure and a resultant sadness about their own perceived value to their long-time colleagues. It is likely that a school or district in consciously acknowledging and systematically attending to some of the institutionally "addressable" emotional needs of its pre-and post-retirees delivers an extraordinarily powerful signal to all its publics. That message says "you matter to us," "we matter to each other," and "you served well and will not be forgotten."

A few educators, when asked what, if anything, a school district ought to provide employees when and after they retire, will say that their districts owe them nothing, that they carry within themselves all the support they need, that cash bonuses at the time of retirement might be nice, but that anyone who seeks bracing for the ego is never going to get it from a bureaucracy. However, I find this response to be rare and the opinion of stalwart persons usually still in professional service, and mostly from the leadership of organizations already celebrated for humane behavior toward their employees. Most employees, whatever their rank, appear to have quite a different view.

It can be argued that "re-involving" an organization's retirees is not possible because it is not part of a given school district's mission. Of course, what is included in a mission statement is that which district leaders intend to be there. The efforts of an institution to track the progress of its graduates may not be included in its statement of mission, but such effort would seem to be sensible and valuable, even though it constitutes additional effort, and some school districts do make that effort. So, too, efforts to involve an organization's retirees, mission-stated or not, would seem to be sensible and valuable, even though constituting additional effort. Of course, a school district leadership's active demonstration of pursuing a quasi-collegial institutional relationship with former colleagues is likely, or possible, only in those whose characteristics are imagination, competence, compassion, and intelligence.

One occasionally hears remarks that a particular reform or innovation is impossible because of fractious members of "the bargaining unit" or "the board." "We can't do that because of The Contract." Perhaps an effort to involve retirees as has been suggested here, initiated by administration or by "the bargaining unit" --or by a united effort of both-- might serve to strengthen the quality of trust in both organizations.

One sometimes hears that a particular reform or innovation is impossible because "the budget won't tolerate that." Perhaps ways can be discovered

or invented that will enable creation of connections with retirees for little or no cost to the taxpayer. In any event, any decision to invest any sum in any project rests on the priorities of the organization: If something is important enough to the decision makers, ways and means will be found. After all, the talent and energy of retirees comprise an enormous potential asset of any school district.

One often observes in schools the sincere admiration of faculty and students for certain secretaries and aides and custodians and bus drivers and cafeteria and grounds workers. In my experience some of the most devoted employees, people who have developed the most powerful kinship with their organizations, are in the classified ranks. That attachment may not evaporate upon retirement. This study focused on the interests and apparent needs of retired teachers and administrators, but the communications and involvement proposed here for certificated retirees might very profitably be appropriately modified and instituted for all retired employees, certificated and classified.

For every district that can say "We do some of these things now," there are many that might say, "We don't --but with leadership and cooperation we could establish and maintain some very beneficial connections."

References

Bloom-Teshbach, Jonathan and S. Bloom-Teshbach. "Psychological separateness and experience of loss." In The psychology of separation and loss, San Francisco: Jossey and Bass Publishers, 1987.

Blum, Debra E. "Association shows "there Is life beyond retirement". Chronicle of Higher Education 35 (1988)

Boulding, Elise. "Changing gender roles in familial, occupational, and civic settings." In Society as educator in an age of transition, eds. Kenneth Benne and Steven Tozci. Chicago: University of Chicago Press, 1987.

Campbell, Patricia F. and Martin L. Johnson. "Computation is not enough." Principal 63 (1983): 38-43.

Ciavonne, Jean. "Dandelions, pine-cone turkeys, and Abraham Lincoln." Phi Delta Kappan 56 (2) 1984): 142-143.

Claugus, Jean Tilford. "Commentary: Extended careers, not retirement." Social Education 51 (1987): 300.

Deal, Terrence E. "The culture of schools." In Educational Leadership and School Culture, eds. Marshall Sashkin and Herbert J. Walberg. Berkeley: McCutchan Publishing Co., 1993.

Dorfman, Lorraine T., Karen A. Conner, William Ward, and Jean Tompkins. "Reactions of professors to retirement: A comparison of retired faculty from three types of institutions." Research in Higher Education 20 (1984): 898-102.

Ekerdt, D. J. "Retirement." In The encylopedia of aging, ed. G. L. Maddox and others. New York: Springer Publishing Co., 1987.

Ekerdt, D. J., I. Baden, E. Bosse, and E. Dibbs. "The effect of retirement on physical health." American Journal of Public Health 73 (1983): 779-783.

Elwell, F. and A. Maltbie-Crannell. "The impact of role losses upon coping resources and life satisfaction of the elderly." Journal of Gerontology 36 (1981): 222-232.

Erikson, Erik H. The life cycle completed. New York: W. W. Norton and Co., Inc., 1982.

Erikson, Erik H., J. M. Erikson, and H. Q. Kivnick. Vital involvement in old age: The experience of old age in our time. New York: W. W. Norton, 1986.

Estrin, Herman A. "Retirees, you've got what it takes: You can teach in business and industry." In Seventy-Seventh Annual Meeting of the National Council of Teachers of English in Los Angeles, National Council of Teachers of English, 1986.

Flynn, C. B. and others. "The redistribution of america's older population: Major national migration patterns for three census decades, 1960-1980." The Gerontologist 25 (1985): 292-296.

Gold, Milton J. and Bernadette Pepin. Passing the torch: Retired teachers as mentors for new teachers. City University of New York, New York Center for Advanced Study in Education, 1987. Report CASE-05-87.

Holmes, James N. HOSTS pilot project: An evaluation report of HOSTS tutoring procedures for students at Cleveland High School during the 1984-85 school year. Portland Public Schools, OR. Research and Evaluation Department, 1985.

Hunter, J. and Eskridge, S. . "Logo LINX --Dot-to-dot LINX." Logo Exchange 8 (1989): 18-23.

Inman, Robert P. The financing of public teachers pensions: Causes, consequences, and public policy. National Institute of Education (ED), Washington, D.C., 1983. Project Report Grant No 6-83-0033.

Kertzer, David I. Ritual, politics, and power. New Haven: Yale University Press, 1988.

Kompf, Michael. "Selected educational thought and action: Construing retired teachers." Teaching and Teacher Education 7 (1991): 479-90.

Marris, Peter. Loss and change. First American ed., New York: Random House, 1974.

Mooney, Carolyn J. "College pension market enters an era of tough competition and close scrutiny." Chronicle of Higher Education 37 (1990): A1, 15.

Morud, Rollie Duane. "Perceptions of retired public school teachers regarding retirement: Implications for preretirement planning." unpublished doctoral dissertation, The University of North Dakota, 1990.

Richardson, Virginia. "Gender differences in retirement planning among educators: Implications for practice with older women." Journal of Women and Aging 2 (1990): 27-40.

Roscoe, John T. Fundamental research statistics for the behavioral sciences. 2d ed., New York: Holt, Rinehart and Winston, Inc., 1975.

Schoenfeld, Clay. "Retired faculty: Sharing the wealth." Academe 78 (1992): 26-29.

Smith, Joyce Ann. "Factors associated with post-retirement Activities of faculty at the Ohio State University electing early retirement." unpublished doctoral dissertation, The Ohio State University, 1992.

Strate, John M. "Post-retirement benefit increases and the adequacy of benefits in state pension plans." Gerontologist 24 (1984): 522-529.

Tocco, Thomas S. and Jerry T. Ingram. "Retirement: Hit or Horror." Spectrum 3 (1985): 41-43.

Walsh, Christy C. "Recent retirees supporting new teachers." Journal of Staff Development 10 (1989): 44-47.

Waters, Elinor B. and J. Goodman. Empowering older adults: Practical strategies for counselors. San Francisco: Jossey-Bass Publishers, 1990.

Wilson, A. Verne. "Recharging retirement life." Music Educators Journal 69 (1983): 27-28.

Acknowledgement: The author is greatly appreciative of the advice and assistance of colleagues Tod A. Anton, Professor, Department of Advanced Studies in Education; and Laura M. Boyer, Associate Librarian (Reference Coordinator), California State University, Stanislaus.